**New Entrant Documentation—Procedures and Documentation Location**

* **How to structure and document the information**
	+ Where to keep it?
		- Option 1—Create new Procedures Document to keep under the Texas SET Working Group key documents.
	+ How to tell a new market participant where to go to find the documentation (CR, TDSP)
	+ How to incorporate this into Retail 101 training
	+ Create outline

**Areas to Document**

* **814\_20 Maintenance Transaction or 867\_03 Transaction Clarification**
	+ ESI ID Format
		- The method used to create ESI IDs-is referenced in Subsection 15.4 Electric Service Identifier of Nodal Protocols Chapter 15 Customer Registration.
		- Reference document from STTF-- **Sharyland ESI ID Format**
	+ Premise Type vs. POLR Customer Class
		- Difference between methods to update Premise Type and POLR Class in ERCOT system
	+ Metered vs. Unmetered service type
		- Method used to create 867\_03 data for unmetered services
	+ Eligibility vs. Start Date
	+ Address Overflow Assignments
		- Use of TDSP supplemental address field
	+ Station ID
	+ Billing or Meter Reading Cycle for metered vs. unmetered services
		- Cycle assignments for unmetered services
	+ Load Profile assignments
		- Data updates required to align with loaded read dates at ERCOT
		- Profile Code changes must be associated with a Time Slice to correctly load Usage in ERCOT systems.  This is buried in the technical Profile Guides but a reference in RMG is needed.
	+ Distribution Loss Factor (DLF) code

**List of other items to address**

* **Add STTF Transition Documents (Lessons Learned) to key documents**
* **Move-In Date plus 1 for customer chosen CR after default CR Move-In**
* **Add Master Customer List (MCL) guide back to the Texas SET Guides**
* **Determine whether an update to 814\_04 and 814\_25 is needed to disallow more than one reject reason code.**
* **Reference New TDSP and / or New CR Market Test Scripts**